

Agilent CrossLab Start Up Services

Agilent VWorks Automation Control 14.1 Software Installation Checklist

Thank you for purchasing a software from **Agilent Technologies**. CrossLab Start Up is focused on helping customers shorten the time it takes to start realizing the full value of their system investment. Installation, Introduction and First Run Assist are service engagements to get your new instrument system on track for lab productivity. Success starts here.

This CrossLab Start Up Installation Software Checklist is used as an activity guide for setting up your new software. A signed copy of this checklist is provided for your records.

Introduction

Customer Responsibilities

- Customers should provide all necessary operating supplies, licenses etc. upon request of the engineer.
- The manuals/media delivered with the system will be used as references. Please make sure that they are available.
- A customer representative should be available to the engineer while performing the installation. Some installation tasks will be beneficial to you if you are present – refer to sections in this checklist
- Availability of a **system/network administrator** as needed to connect to your intranet.
- While Agilent is delivering **Installation and Introduction** services, users of the software should be present throughout these services; otherwise, they will miss important operational and maintenance information. Especially important sections of the checklist are noted by **"Customer presence recommended"**.

Important Customer Web Links

- You can find links to videos, application notes, and other resources at [Lab automation control software, integrated laboratory | Agilent](#)
- The VWorks Knowledge Base is available within the software and it is also posted online at www.agilent.com/chem/askb
- To access the **Agilent Resource Center** web page, visit <https://www.agilent.com/en-us/agilentresources>. The following information topics are available:
 - Sample Prep and Containment
 - Chemical Standards
 - Analysis
 - Service and Support
 - Application Workflows
- The **Agilent Community** is an excellent place to get answers, collaborate with others about applications and Agilent products, and find in-depth documents and videos relevant to Agilent technologies. Visit <https://community.agilent.com/welcome>
- **Need to place a service call?** [Flexible Repair Options | Agilent](#)

Service Engineer's Responsibilities

- Only complete/printout pages that relate to the system being installed.
- Complete empty fields with the relevant information.
- Complete the relevant checkboxes in the checklist using a "X" or tick mark "✓".
- Check **"Section not applicable"** check boxes to indicate services/tasks not delivered, as appropriate.
- Complete the **Service Review** section together with the customer.
- Complete the fields for page numbers at the foot of each selected page
- Add relevant page numbers to selected pages and complete the total number of pages field in the Service Completion section.
- **Ask the customer to sign the Service Completion section including the customer's and Service Engineer signature. Attach the signature page when closing out the Service Order.**

Additional Instruction Notes

- For detailed installation procedures, see the [VWorks Automation Control 14.1 Installation Guide](#) (part number D0005579).
- The VWorks 14.1 user documentation is available in the VWorks Knowledge Base, which is installed with the software. This Knowledge Base includes the following:
 - [VWorks Plus Configuration and Administration Guide](#) and [VWorks Plus Quick Reference](#)
 - [VWorks Standard Configuration and Administration Guide](#) and [VWorks Standard Quick Reference](#)
 - [VWorks Automation Control Setup Guide](#)
 - [VWorks Automation Control User Guide](#)
 - [VWorks Protocol Author Quick Guide](#)
 - User Guides for devices supported in VWorks 14.1, such as [Bravo Platform User Guide](#)
- PDFs of the user guides are installed in the following folder by default:
C:\Program Files (x86)\Agilent Technologies\VWorks\UserGuides

Software Installation

System Information

- ☐ Check this box if an instrument configuration report is attached instead of completing the table.

Software / Product Numbers	Revision	License Number
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		

Bundled Computer Hardware Information

- ☐ *Section not applicable*

List the PC Name, Network Components and/or Peripherals	Model Number	Serial Number
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		

Preparation

- ☐ Unpack/verify the condition and completeness of shipment. For discrepancies, use the following table.

Product or Part Description	Observation	Action

- ☐ Discuss any specific questions or issues with the customer before starting.
- ☐ Discuss any configuration options with the customer before starting.
- ☐ Ensure that the computer meets the specifications detailed in the *VWorks 14.1 Site Preparation Checklist* and the Release Notes.
- ☐ Ensure the computer name contains only approved characters (alphanumeric and hyphen). Do not use underscores in the computer name.
 - ☐ Ensure that Microsoft Windows is configured to Never Sleep. If the computer goes into Sleep mode, a computer restart might be required before VWorks can successfully log-in to OpenLab Shared Services.
- ☐ Check that the Windows build is the same as the one specified in the Site Preparation Checklist. This build has been verified to work with VWorks 14.1.
- ☐ Check for required Service Note applicability, software patches, and firmware updates if connecting to instruments.
- ☐ Locate appropriate license authorization codes and/or license certificates and verify against sales order.
- ☐ If applicable, install your automation devices, including power and communication cables.
- ☐ Ensure that the LAN-cable is connected, for example, the connection between the computer and the automation device. If not connected to a LAN, the OpenLab for VWorks installation may fail.
- ☐ Upgrades only – Ensure with the customer that instrument control settings, data, methods etc. have been properly saved or archived before starting any installation procedures.
- ☐ In the VWorks software, use the **File > Export VZP File** command to export backup copies of your current protocols. For detailed instructions, see the "Exporting and importing protocols" topic in the [VWorks Automation Control User Guide](#).
 - ☐ Uninstall the previous VWorks Plus or VWorks Standard version before installing VWorks 14.1.

- ☐ If applicable, uninstall any 13.1.x or earlier versions of the VWorks software. See the [VWorks Automation Control 14.1 Installation Guide](#) for instructions.

Installation Procedure

Refer to the [VWorks Automation Control 14.1 Installation Guide](#) for detailed instructions on these checklist sections.

During the software installation, you will be prompted for system administrator login credentials. If this is a new installation, use the following credentials:

User name/Login: *admin*
Password: *openlab*

Bundled PC Installation Tasks – Section 1

- ☐ *Section not applicable*

NOTE

The installation wizard will prompt you to reboot if the computer does not have all the prerequisites. Ensure that you save any work in process before continuing.

- ☐ Log on to Microsoft Windows as a local administrator.
- ☐ Copy the entire contents of the supplied USB drive to the **C:\Temp** folder on the computer, and then remove the USB drive from the computer.
- ☐ Unzip the **OpenLabForVWorks_2.6.0.841.zip** archive to **C:\Temp**.
- ☐ To run OpenLab for VWorks installer, double-click the **OpenLabForVWorks_2.6.0.841.exe** file:
 - ☐ In the installation wizard, choose the edition for which you have a valid license: **VWorks Plus** or **VWorks Standard**.
 - ☐ Follow the installation wizard instructions to restart the computer when prompted to do so.
Wait for the installation wizard to resume after the restart before continuing.
 - ☐ If you are prompted for Shared Services Administrator Credentials, log in using system administrator credentials.
 - ☐ In the Wizard Completed page, verify that the message "successfully installed OpenLab for VWorks" appears.
If the installation was not successful, rerun the installer.
 - ☐ Verify that the OpenLab Control Panel opens.

- ☐ If the customer wants to use Windows Domain instead of OpenLab Internal (default) Authentication, change this setting in the OpenLab Control Panel before proceeding.
 - ☐ Refer to the [Configuration and Administration Guide](#) for the VWorks edition for instructions on OpenLab Authentication settings.

IMPORTANT: Changing to Windows Domain Authentication after installing VWorks will erase the user groups that VWorks publishes in the Control Panel. These user groups are associated with all the required roles and privileges for the VWorks software.

- ☐ Run the VWorks 14.1 installer from the C:\Temp\ folder or the Windows desktop as follows:
 - ☐ Double-click the **VWorks_14.1.0.xxxx.exe** file, where xxxx is the build number.
 - ☐ Follow the wizard prompts to install Bravo IQOQ Test Utilities.
 - ☐ When the VWorks Login window opens, log in using system administrator credentials.
 - ☐ Follow the wizard prompts to finish installing Bravo IQOQ Test Utilities, and then install VWorks 14.1.
 - ☐ When the VWorks Login window opens, log in using system administrator credentials, and then finish the VWorks installation.
 - ☐ After the installation is finished, right-click the VWorks shortcut on the desktop, and click Run as administrator. Verify that the VWorks window opens without errors.
- ☐ Restart the computer.
- ☐ Run the Agilent Software Verification Tool to ensure that all the software components installed correctly.

NOTE: The Software Verification Tool does not replace the Bravo IQOQ service. The Bravo IQOQ service is a separate service, which the customer can order from Agilent.

Upgrading VWorks 14.0 to the same edition in VWorks 14.1 - Section 2

- ☐ *Section not applicable*
- ☐ In VWorks 14.0, use **File>Export VZP File** to export backups of current protocols.
- ☐ In Windows, go to **Settings > Apps > Apps & features** and uninstall the following:
 - ☐ Agilent Bravo IQOQ Test Utilities
 - ☐ Agilent VWorks software 14.0
 - ☐ Agilent OpenLab Server 2.5.0.927 (This uninstalls all related OpenLab components.)
 - ☐ Agilent Software Verification Tool
- ☐ Restart the computer.
- ☐ Perform all the steps in section 1, above, to install the software.
 - ☐ When you install OpenLab for VWorks, make sure you specify the **same edition** that you are upgrading from: VWorks Plus to Plus, or VWorks Standard to Standard.

Upgrading VWorks 14.0 to a different edition in VWorks 14.1 - Section 3

- ☐ *Section not applicable*
- ☐ In VWorks 14.0, use **File>Export VZP File** to export backups of current protocols.
- ☐ In Windows, go to **Settings > Apps > Apps & features** and uninstall the following:
 - ☐ Agilent Bravo IQOQ Test Utilities
 - ☐ Agilent VWorks software 14.0
 - ☐ Agilent OpenLab Server 2.5.0.927 (This uninstalls all related OpenLab components.)
 - ☐ Agilent Software Verification Tool
- ☐ Restart the computer.
- ☐ Perform all the steps in section 1, above, to install the software.
 - ☐ When you install OpenLab for VWorks, make sure you specify the **VWorks edition**: VWorks Plus or VWorks Standard.

Software Configuration and Setup

Configuring OpenLab Control Panel (Customer presence recommended)

- ☐ *Section not applicable*
- ☐ Refer to the [Configuration and Administration Guide](#) for your VWorks edition to perform the tasks in this section.
 - ☐ To locate the guide, in the Windows Start menu go to **Agilent Technologies > VWorks Knowledge Base**. In the **VWorks Installation and administrator guides** topic, click the **Administrator Guide** link for your edition (VWorks Plus or VWorks Standard).
- ☐ Configure and install license
 - ☐ Explain that the 60-day start-up license starts at first launch of the software and ends 59 days later. A final license must be installed to continue using the software.
 - ☐ In OpenLab Control Panel, review with customer the steps to obtain a software license. If necessary, assist customer in obtaining a license with SubscribeNet.
- ☐ Confirm authentication setting.
 - ☐ Document the authentication option the customer chooses:
 - Internal (default). In this case, no additional authentication changes are needed.
 - Windows Domain. If the authentication is changed to Windows Domain after running the VWorks 14.1 installer, you need to reinstall VWorks 14.1 to republish the predefined VWorks Groups and ensure that the users imported from Windows have all the required roles and privileges.
- ☐ Configure security policy per the [Configuration and Administration Guide](#) for the VWorks edition.
 - ☐ Document the Control Panel security policy configuration options the customer wants:

Configuration option	Value selected	Notes

☐ Configure Users, Groups and Roles

- ☐ Explain the Everything role is for a system administrator who can use all software features in OpenLab Control Panel and VWorks. Advise that a primary and a backup be assigned Everything role.
- ☐ Explain that one of the following VWorks roles is required to log in to the VWorks software: VWorks Administrator, VWorks Technician, VWorks Operator, or VWorks Guest.
Note: The predefined VWorks groups are already associated with the corresponding VWorks roles and include project and instrument privileges required to run the VWorks software.
- ☐ Explain how to configure users and groups for the selected authentication type:
 - If using Internal authentication, explain how to create users in OpenLab Control Panel and assign users to VWorks groups.
 - If using Windows Domain authentication, explain how to:
 - Import users into OpenLab Control Panel and assign users to VWorks groups.
 - Import groups, assign groups to VWorks roles and Instrument roles.

For details, see the [Configuration and Administration Guide](#).

☐ Configure Project settings

- ☐ Explain VWorks Projects/VWorks is created by default.
Note: Optionally, customer may create additional projects.
- ☐ *VWorks Plus only*. Explain settings for Audit Trail Comments and E-Signatures.
- ☐ *If applicable*, explain how to assign project privileges to imported Windows Domain user groups.

☐ Configure Instrument

- ☐ Explain *Instrument* created by default is same as VWorks computer connected to automation device.
- ☐ *If applicable*, explain how to assign instrument privileges to imported Windows Domain user groups.

☐ *If applicable*, configure e-mail server.

☐ *VWorks Plus only*. Demonstrate how to open Content Browser.

- ☐ From the Windows Start menu go to **Agilent Technologies > Content Browser**.

☐ System Maintenance

- ☐ Refer to the applicable [Configuration and Administration Guide](#) for VWorks Plus or VWorks Standard.
- ☐ Explain how to backup and restore.
- ☐ Review other maintenance tasks.

Setting up VWorks (Customer presence recommended)

- ☐ *Section not applicable*
- ☐ Start the VWorks software.
- ☐ Refer to the [VWorks Automation Control Setup Guide](#) and explain relevant tasks for this customer.
 - ☐ To locate the guide, in the Windows Start menu go to **Agilent Technologies > VWorks Knowledge Base**. In the **VWorks Setup Guide** book, locate the **VWorks Setup workflow** topic.
- ☐ *VWorks Plus only*. Set up compliance features:
 - ☐ Specify audit trail options in VWorks Option dialog box.
 - ☐ *If applicable*, set up and establish connection to E-Signatures database (PostgreSQL).
- ☐ Explain labware entries and liquid classes.
- ☐ *If applicable*, migrate protocols from previous VWorks version.
- ☐ MinHub only. Establish connection to Inventory database (MySQL) for tracking labware in storage.
- ☐ *If applicable*, set up and establish connection to Experiments database (PostgreSQL).
- ☐ In the VWorks software, establish communication with connected device or devices.
 - ☐ Refer to the applicable device-specific installation checklist for details. For example, to connect to a Bravo Platform, see the [Bravo Platform Installation Checklist](#).
 - ☐ If the customer has a Bravo Platform, advise them that the Bravo IQOQ service is a separate purchase that requires a reagent kit in addition to the software.


Software Product Options

Optional Installation Tasks

- ☐ *Section not applicable*
- ☐ List any additional software installed

Product or part description	Version	Notes

Service Review

- ☐ Attach available reports/printouts to this documentation.
- ☐ Record the time/date of installation or upgrade completion in the customer's records/logbook.
- ☐ Complete the following Service Engineer comments section if there are additional comments.
- ☐ Review the installation/upgrade with the customer.
- ☐ Explain Agilent warranty for software (media only).
- ☐ Explain how to use manuals, guides, and online help. Demonstrate the Context-Sensitive Help button  in the VWorks software.
- ☐ Explain how to get self-help, and FAQs online.
- ☐ Explain how to log a software service call and support services that are available.
- ☐ Advise customer of additional application training options.
- ☐ If the instrument firmware was updated, record the details of the change in the service engineer's comments box or if necessary, in the customer's IQ records.
- ☐ **Complete the Signature Page with both Agilent and Customer signatures.**
- ☐ **Attach Signature Page when closing the Service Order.**

Signature Page

Service Engineer Comments (optional)

If there are any specific points you wish to note as part of performing the installation or other items of interest for the customer, please write in this box.

Service Verification

Service Request Number:

Date of Service Completion:

Service Engineer Name:

Customer Name:

Service Engineer Signature:

Customer Signature:

Total number of pages in this document: